

# TAB I

**Customer Visit Recap**

**PRE-CALL PLANNING**

**Practice Name:** Dean Clinic  
**City, State:** Madison, WI  
**Site #:** 001664  
**Telephone #:** 608-250-1459  
**FAX #:** 608-252-8299

**Directions to the practice:**

**Affiliations (e.g. - Group, IPA, MSO, PPM, networks):**

**Responsibility: (fill in names)**

**Inside Sales:** Kristyn Stroble  
**RBDM:** Michael Breshgold  
**RSD:** Marsha Peterson

**Practice Profile:**

**Current OTN payment terms:(mark with XX):**  
**2% DD:** 1% 30 net 60:  
**net 75:** credit card:

**Current BMS monthly average:** \$37,500  
**Current Aredia monthly average:** \$3,000  
**Current monthly OP average:** \$30,000  
**Monthly OP potential average available:** \$1,000,000

**Manufacturer contracts: (mark with X):**

|                     |                                      |
|---------------------|--------------------------------------|
| Neupogen (Amgen):   | Leucovorin (various generic mfrs):   |
| Intron (Schering):  | Methotrexate (various generic mfrs): |
| Taxotere (Aventis): | Roferon (Roche):                     |
| Anzemet (Aventis):  | Neumega (Genetics Institute):        |
| Kytril (SKB):       | Doxorubicin (various generic mfrs):  |
| Zofran (Glaxo):     | Other:                               |

**Lynx status: (mark with Yes or No)**

**Does practice have Lynx?** YES  
**If yes, has practice signed LTTF contract?** No  
**If yes, is practice utilizing Lynx Partners Program (if not a group member)?**

Defendants' Exhibit

**2621**

01-12257-PBS

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POST CALL

**Date: April 30, 2003**

**Attendees:**

- Michael Breshgold, RBDM
- Patrick Leary, Pharmacist

**Objective of call:**

- Taxol
- Lynx
- NOA
- Lynx Data Management Reports
- Enhancement schedule

**Summary of meeting:**

Followed up on a couple of items. Taxol for one. The bottom line here is that they signed a contract with Abbott and in order to change for a lower price Abbott has the right to first refusal. So they are sticking with generic until the contracts expire. We can try to lower their baseline and that would give them a great deal for their purchases and keep them at home with Carboplatin. We also discussed the visit of Mike Kopicko which Patrick will not be there for the visit tomorrow. The follow up needs to be to get a contract out for the single bay by the end of June. He is also going to check the IGIV and get back to me on the possibility. They are buying the brand through the Red Cross.

**Action Items:**

1. Follow up with Mike to see if any situations have arisen.
2. Get the j code for Amend the new antiemetic from Merck. He said it was priced at 250.00 for three tablets.
3. See about lowering Taxol base to get some of the business.

**Action Items:** Michael Breshgold

- Get information about restaurant in Phoenix for Patrick for his visit.
- Get them signed up for the Lynx data management reports.
- Follow up with a call to Patrick this Friday with the information concerning the printer.
- Call Scot Wagner and have Scot call them as a follow up to our conversation about NOA.

Complete a request for a new single bay auxiliary unit for the practice.

**Date: March 3, 2003**

**Attendees:**

- Michael Breshgold, RBDM
- Patrick Leary, Pharmacist
- Nettie
- Joan from BMS

**Objective of call:**

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- Taxol
- Lynx
- NOA
- Lynx Data Management Reports
- Enhancement schedule

**Summary of meeting:** A good meeting and followed up on several items from our last meeting with Patrick. First, we compared Taxol prices and they are paying 320.00 for Onxcol and we discussed a price of 299.00 for Taxol. Patrick checked on volume and I called Kristyn to get the baseline set at 35 vials a month which they should easily make each month. We now have the Taxol business. Next we discussed the need to join NOA and Kristyn if following up with an application form for the practice. They can save a good deal of money on the pricing they are getting now. We also discussed the new printer that they need and the enhancements they will be getting in the future. Nettie seemed happy with the upgrades and they requested an afternoon time frame and training the following day on the system. I think the key here is to follow up with the practice on a regular basis and keep them in the loop on pricing specials

Action Items: Michael Breshgold

- Get information about restaurant in Phoenix for Patrick for his visit.
- Get them signed up for the Lynx data management reports.
- Follow up with a call to Patrick this Friday with the information concerning the printer.
- Call Scot Wagner and have Scot call them as a follow up to our conversation about NOA.
- Complete a request for a new single bay auxiliary unit for the practice.

**Attendees:**

- Attendees:
- Michael Breshgold, RBDM
- Patrick Leary, Pharmacist
- Nettie
- Peg Sprecher, RN - Lead

**Objective of call:**

- Lynx2OTN
- Introduction
- NOA
- Lynx Data Management Reports
- 

**Summary of meeting:** The meeting went well. Patrick asked everyone to speak up with any problems and concerns and they did. The first thing discussed was the new contract for the auxiliary unit which will house clinical trial drugs. Alex is faxing the contract and I will call to ensure that they have everything they need. They mentioned the good service by Alex and they appreciated that. They seemed to be having printer problems so I mentioned that I will have the 1200 sent out to the practice as soon as possible. They also said that they have been working with Dan Lauder for their interface.

**Reports class** - I asked if anyone was interested in attending the reports class and Patrick expressed interest and I need to give him information if any is available concerning the class and he is looking at the November date. He needs to check out before any commitment.

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**Lynx2OTN** – I worked with Patrick on the Lynx reports and he could not get the reports he wanted so we called and got him the sign up sheet to fax in for access to Reports. He will follow up with that.

**Premier** – Patrick stated that he does not know if he can join NOA with Premier I will follow up with Alex to get him the right answer to his question. He stated that they are in affiliation with 50 sites across the Midwest. I also mentioned the consulting services of KRJ and he would like more information. I hopefully will be able to gain additional business once all of their issues have been sorted out

Action Items: Michael Breshgold

- 1) Send Information on KRJ consultants
- 2) Contact Alex for new printer for practice
- 3) Ask about NOA and Premier contract
- 4) Send information on Reports class training

Action Items: Alex Avalos

- 1) Fax contract for auxiliary unit
- 2) Continue to call on a regular basis and follow up with printer

[REDACTED]

**Attendees:**

- Marsha Peterson, RBDM
- Patrick Leary, Pharmacist
- Peg Sprecher, RN - Lead
- Chris Schwartz, RN Manager

**Objective of call:**

- Lynx2OTN
- .25% Lynx2OTN Discount
- NOA
- Manufacturer Contracts
- Lynx Data Management Reports
- Data Compliancy

**Summary of meeting:** This was a great meeting. I was given the opportunity to present NOA and Lynx Data Management Reports to all of the above. Chris even came down – she had in her hand the signed contract for the Lynx Auxillary. We have waited several months for this.

1. **Lynx Double Bay Auxillary Contract Signed.** The nurses have wanted this for quite awhile. They are going to want to store their study drug behind one door – with nothing else in it (for better tracking – inventory on this drug is frequently off). They also would like to try to put the 2 refrigerators on top on one another. They have 2 very tall nurses and they are constantly complaining about the bottom shelf of the refrigerator. I am not sure if this can be done – it would be great if the AS assigned to install would try. This account does not auto order due to problems with getting PO's generated from purchasing department. Before the AS goes in to install – Please call me!!!
2. **Tempe Training – Deb Hurst is the RN that they would like to send.** Please call her with class schedule.
3. **NOA** – I reviewed this with Patrick in detail. He will present to Paul – he is pretty sure they will sign. It would be a good idea for Alex to call Patrick to see if there are any other questions?
4. **Lynx2OTN** – I explained the program to Patrick. He will pass the info on
5. **Lynx2OTN** – Reviewed both books with Patrick, Peg and Chris. They thought it was great and I think they are going to start using it more.
6. **Lynx Data Management Reports** – I trained all three on the reports. I explained what is needed for compliancy. They are doing everything except Staging consistently. I give some suggestions on how

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to keep it up. I left behind my Reports Binder and Required Data piece. They are excited about getting access.

7. **Manufacturer Contracts.** Patrick is going to check with Paul and Chris to see what they have that OTN does not have loaded. I explained the process and told him to call Alex if he had any questions.

**Action Items (copied to submitted weekly distribution)**

| Date | Practice, Site #  | Action                                                                              | Assigned To    | Due Date |
|------|-------------------|-------------------------------------------------------------------------------------|----------------|----------|
| 8/30 | Dean Clinic #1664 | 1. Follow up with Patrick regarding NOA contract                                    | Alex Avalos    |          |
|      |                   | 2. Call me regarding the install of the new DB Auxillary Station (see site note #1) | Maureen Koba   |          |
|      |                   | 3. Deb Hurst is the nurse interested in going to Tempe (new contract signed)        | Leslie Trunell |          |
|      |                   |                                                                                     |                |          |

**Attendees:**

- Marsha Peterson, RBDM
- Patrick Leary, Pharm D
- Peg Sprecher, RN
- Marni Fisher, Clinical Research Associate

**Objective of call:**

- Kytril
- Drug Ordering
- OTN OnLine
- Lynx Data Management Reports
- Data Compliancy

**Summary of meeting:** Pat was thinking that Lynx was not really saving them on drug inventory – until we got into the discussion about them not being able to use the auto-order feature. Also, because of this they are not able to keep a lower inventory since they still have to process their orders thru their purchasing department.

8. **AS ReVisit** – I think it would be a good idea to have an AS revisit this account in the near future. They are awaiting the signing of a Auxillary Bay contract – the revisit could coincide with that install. They have several things they would like addressed on revisit: 1. Is there some way to better handle the Narcotics Log 2. Work with Marni Fisher the Clin Research Associate regarding ways she could better utilize Lynx – from how the drugs are entered to reports that she could print (call her in advance to make sure she makes time for you) 3. Basic User Inservice – review inventory, etc 4. Could we do a special inservice on a Wed AM for New Employees
9. **Tempe Training – Deb Hurst, RN OCN.** If at all possible they would like to send Deb Hurst to training in the Fall. They are losing one of the main Lynx users and Peg is currently the only one that knows how to do the more advanced functions
10. **Remote Arm vs Single Bay Auxillary.** This account definitely needs more space for Refrigerated drugs. Supposedly they currently have a contract in (OTN sent one to Chris Schwartz??) for a Single Bay Auxillary. They have heard nothing from Kris regarding signing it. #1 Did we send a contract #2 If yes, when and have we received it back? #3 If no, I would like an AS to review the choices with the account to make sure we do what is best. The main thing they need the extra space for is for Refrigerated Drugs – How about a Remote Arm on a Refrigerator????
11. **Educational Grant money for S200 Tempe CEU's.** Their clinic does not give them any money's for Educational
12. **Lynx Data Management Reports – Inservice for Doctors.** Dr Diggs did a Retro Study on Breast Cancer. These reports would have really helped him. They think that doing an inservice to their docs regarding these reports would be great.
13. **Drug Pricing.** Cardinal is their Wholesaler with .71-.91% 30 day terms. Premier is their GPO. They have increased their business to us. Still an issue with PO system and auto-ordering thru Lynx. **FAX Remicade and Neupogen prices to PAT.** This account would be a great account to Target OP

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– It is my belief that if Alex got a good relationship going with PAT we could increase our business.  
Let's start by taking the above 2 drugs and then work on others 2 at a time.

**14. Email Taxol Baseline to Pat.**

**Action Items (copied to submitted weekly distribution)**

| Date   | Practice, Site #  | Action                                                                                                                                          | Assigned To  | Due Date |
|--------|-------------------|-------------------------------------------------------------------------------------------------------------------------------------------------|--------------|----------|
| 6/5/01 | Dean Clinic #1664 | 1. Has a Single Bay Auxillary Contract gone out for this account some time in the past few months? (see site note #1 and #3)                    | Jamie Keller |          |
|        |                   | 2. We need to call Peg Sprecher to discuss if it would be better to get Single Bay Aux or Remote Arm for Refrigerator (see site note #1 and #3) | Maureen Koba |          |
|        |                   | 3. Could we send Deb Hurst to Tempe in the Fall?                                                                                                | Nikole Best  |          |
|        |                   | 4. FAX and follow up call Pat regarding Remicade and Neupogen prices (see site note #6)                                                         | Alex Avalos  |          |

**Date of call:** 12/7/00

**Objective of call:**

- Discuss Taxol/Carbo Program and status of Generic Taxol
- Present OTN OnLine Features
- Status of drug purchasing from OTN
- Status of Lynx

**Attendees:**

- Marsha Peterson, RBDM
- Deb, RN
- Peg Sprecher, RN
- Kris Schwartz, RN Supervisor
- Patrick Lary, Clinical Pharmacy Specialist
- Paul Miller, Pharmacy Purchasing Agent

**Summary of meeting:** I was able to meet with about everyone excluding the doctors withing Dean Clinic that has any interaction with OTN. Since the Lynx has now been installed for about 4 months this account is at a point of frustration and needs help. They actually have a sign on the Lynx called "Beast". This is not a good sign. The nurses were relieved to here that what they were experiencing were normal growing pains. Patrick Lary the Pharmacy Specialist spent a lot of time with me and made sure I met everyone that I needed to.

1. **Status of Lynx/Contract for new Single Bay Auxillary:** They definitely need an Application Specialist ReVisit scheduled. Later January to early Febuary would be great. Deb along with Peg are the Lynx superusers. Deb didn't go to Tempe but she has been given the responsibility of Lynx. She explained that they were not wasting correctly, their inventory was off and because of this the nurses didn't trust the system. There are 2 very tall nurses that were constantly complaining about having to bend over to get drug. They have 2 refrigerators and they drugs literally fall out when they open the doors. It would be very helpful if we could add a single bay auxillary to this account. Would it be possible to put a refrigerator up high instead of down low? If we could this would help the attitude of the tall nurses. I think that they are doing pretty well overall but need some retraining. I would advise that Davette work with Peg and Deb first before starting – since they are incharge of the other nurses. If we can get a single bay in there it would be great if it can be installed at the same time as ReVisit.

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2. **Roadblock at Lynx:** The nurses are very busy and there are a lot of them mixing drugs. They are complaining that there is always a line to get drugs out of Lynx. This is usually when things are busiest adding to the frustration. I suggested to Deb and Kris to consider having one nurse do the mixing and to trade off each day who does it. When Peg and Kris were in Omaha they say this practice doing this and thought it looked like a good idea then. This is something you will need to bring up to both Peg and Deb prior to starting.
3. **Lynx Reports:** They are just starting to look into the reports. There are a lot of things that they would like to do. Patrick Lary the Pharmacist is the one that would like to know more about this. He is the one that oversees things and they have put him in charge of reports. He did go to Tempe and seems to know the system quite well but has very little time to get in front of it. They just need some help. I instructed them to call the Lynx dept in the meantime.
4. **Premier Buying Group:** They purchase the majority of their drugs and supplies through Premier. Where does OTN stand with this buying group? Do we honor that contract? If yes – how do we get them signed up? If no – are we working on it.
5. **Coding and Charging Question:** For Home Infusion how do the code and bill Batch CAD Pumps? They need to break this out from regular billing. It is for Continuous Infusion (6 months) – They need a code for day 1-15 and another for 16-30. She feels that some other Lynx customer must be doing this and could help them.
6. **Modifiers:** Is there a modifier for Pre/Post Hydration? Currently they do not have a separate admin fee for Pre/Post Hydration, it is currently part of Chemo Admin.
7. **Currently there are no OpusMain drugs:** Patrick and I discussed this issue at some length. Patrick realizes that one of the benefits of Lynx is auto-ordering. One of the problems is that they have a purchasing dept within Dean Clinic that runs the show and have to follow their guidelines. Patrick set up a meeting with Paul Miller the Pharmacy Purch Mngr.
8. **Real Time PO system makes auto-ordering impossible:** PO's have to be generated for every invoice within the Dean System. Paul explained that the computer system that they are in currently does not have the capability of generating batch PO's – which is what would be needed for auto-ordering. He was not against Oncology having auto-order – but currently they will not be able to do it. He is hopeful that they will be getting a new system within a year or so and that then Oncology can auto order.
9. **Emergency Drug Supply:** When I walked into purchasing one of the first things I recognized was a shelving unit full of Oncology drugs. I immediately pointed it out to Patrick – since earlier he expressed his concern over the fact that their drug purchases seemed to have increased since the placement of Lynx. Now he knows why. Paul explained that the reason they were there was that they currently have a 48 hour turnaround time once the drug is ordered from Oncology and that the nurses frequently call prior to shipment saying that they are out of drug. There is a old comfort level at work. Paul and Patrick agreed to work on this with the nurses. They may actually need to increase some of the pars on the Lynx. This is also something that the Davette should discuss with Patrick. 2 of the drugs that Paul said were asked for with regularity were Vepsid and Bleo.
10. **Remove Debbie Purdee and Tina Kligora from OTN Database and OTN OnLine roster.** These 2 women no longer work there.

| Action Items                                                                                    | Assigned to     | Date  |
|-------------------------------------------------------------------------------------------------|-----------------|-------|
| 1. Need to send a contract to Kris Schwartz to add Single Bay Auxillary (see #1 in site notes)  | Fadia Alaraj    | 12/31 |
| 2. Follow up with Kris regarding signing contract ASAP                                          | M Peterson      | 12/15 |
| 3. Schedule ReVisit to coincide with Install of new Single Bay Auxillary (see #1 in site notes) | Melissa Candau  | TBD   |
| 4. Review needs of this account by App Specialist                                               | Davette Keller  | NA    |
| 5. Status of Premier Buying Group (see #4 in site notes)                                        | Kirby Eng       | 12/29 |
| 6. Answer Questions regarding Coding and Billing (see #5 in site notes)                         | Louis Chinn (?) |       |

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|                                                                                  |              |       |
|----------------------------------------------------------------------------------|--------------|-------|
| 7. Remove Debbie Purdee and Tina Kligora from OTN Database and OTN OnLine roster | Cecely Bunac | 12/29 |
|----------------------------------------------------------------------------------|--------------|-------|

**POST CALL**

(copy and paste this section above last call before filling in)

**Date of call:**

**Objective of call:**

**Attendees:**

**Summary of meeting:**

**Action Items**

**Assigned to**

**Due date**

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